



DOCUMENT CHECKLIST

	Located	Not Located
Superannuation Statements		
Insurance Statements		
Mortgage Documentation		
Investment Documents – Mortgages / Personal Investments		
Tax Returns		
Share Certificates		
Cash Investments, Mgd Funds & Bond Certs		
Investment Property Details		
Savings Statements		
Personal Budgets / Living expenses		
Income statements		
Pension Benefits if applicable		
OTHER		

Note: Should you not be able to locate the required documentation – the consultant with work through those issues on the day of the appointment. Please fax further information to **02 9548 0333** / **Email scan to cwells@financialcents.com.au** / Mail to: **PO BOX 505, ENGADINE NSW 2233**